

The Presenter's Path®

Presentation Skills for Investment Professionals



CFA 2010 Society Leadership Conference

My First CFA Presentation



Seattle Society of Financial Analysts - 1982



In 2010?

"Uncertainty"

"Media hypersensitivity"

"Lost decade"

"Violently sideways
trading market"

"Career stagnation"

"No time to prepare"

"Overloaded"

"Less time to volunteer"



The Solution: Add Value



Connect with your audiences



Create clear, concise and compelling content



Communicate with confidence



Collaborate across cultures

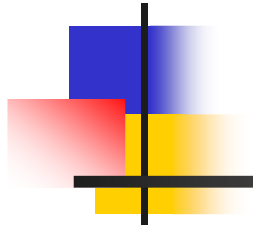
Connect



Know The Audience and Territory



- Audience
- Territory
- Value



Know The Audience and Territory

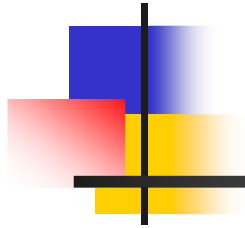
Scenario 1: Endowment Pitch

- What: Proprietary Selection Process (PSP)

“We create a number ranking for each stock,
which determines if it’s in our portfolio.”

- So What: Value

- Compare companies across industries
- Create a well-balanced/high performing portfolio
- Capture growth. 3% over benchmark...



Know The Audience and Territory

Scenario 2: Research Manager

- What: Market Update

“If earnings continue on this path, the S&P 500 is priced at 8% yield, while 10-year treasuries are at 3%...”

- So What: Value to Client Communication

- Context: “objectively, the stock market is cheap...”
- Confidence: “share our perspective that ...”

Know The Audience and Territory

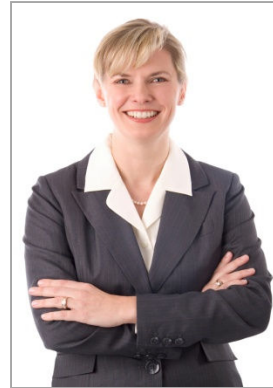
Communication Styles



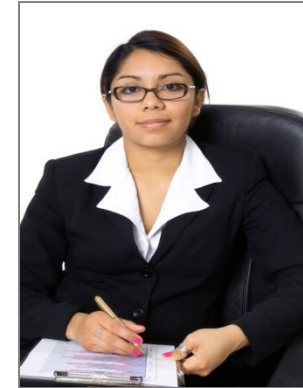
**Dominant/
Driver**



**Sociable/
Influencer**



**Amiable/
Steady**



**Conscientious/
Analytical**

Know The Audience and Territory

Communication Styles



**Dominant/
Driver**

- Assertive, direct and action – oriented
- Focus on results
- Provide options and let them decide

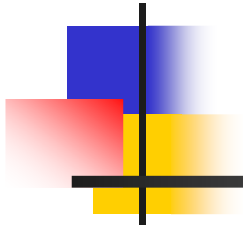
Know The Audience and Territory

Communication Styles



**Sociable/
Influencer**

- Outgoing, animated
- Focus on people, involvement, who is using product/service
- Be enthusiastic and provide ideas for implementation



Know The Audience and Territory

Communication Styles

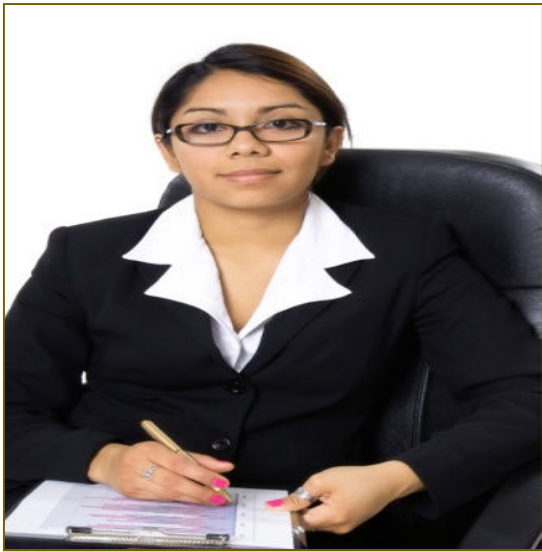


**Amiable/
Steady**

- Calm, listens well, may avoid conflicts
- Focus on support, service and stability
- Provide step-by-step implementation plans

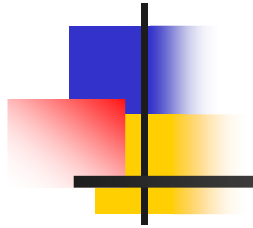
Know The Audience and Territory

Communication Styles



**Conscientious/
Analytical**

- Very well organized, less emotional – more objective
- Focus on logic, order and accuracy
- Clarify priorities and criteria for decisions
- Emphasize past record

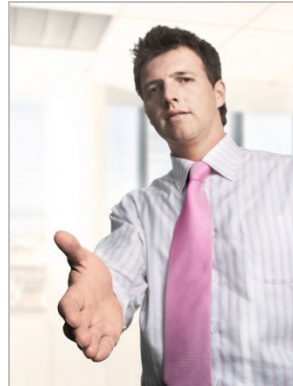


Know Your Style

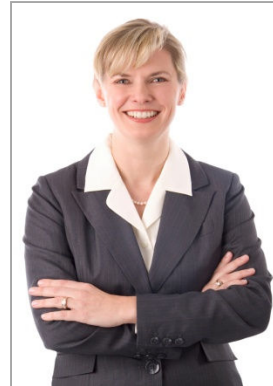
Communication Styles



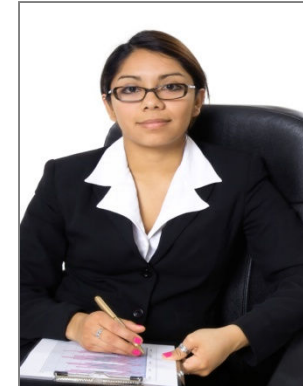
**Dominant/
Driver**



**Sociable/
Influencer**



**Amiable/
Steady**



**Conscientious/
Analytical**



Create Your Message



*"We've found that you
do have opportunities!"
Driving Machines
in Emerging
Markets."*

Target Your Content



- Select 3-4 points
- Focus on what the audience needs to know
- Build in a buffer

Make It Easy to Understand

Current Events



- Provide a broader perspective to your information
- Examples: new government regulations; industry trends; news items; discoveries or innovations.

Make It Easy to Understand

Example/Evidence



- Provide data on results and track record.

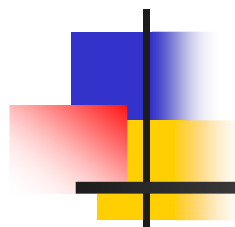
"In working with the State University endowment, we created a plan that reduced the number of funds from 6 to 3 which saved them \$15,000 per year in fees and delivered returns of ..."

Make It Easy to Understand

Similes/Analogies



- Provide comparison between dissimilar items
 - "X" is like "Y"
- Help reduce confusion
- Fit the analogy to the audience



Make It Easy to Understand

Tell A Story With The Numbers

Startup.com

	2009	2010	2011	2012	2013
Revenue	\$ 642,424	\$ 2,875,964	\$13,223,679	\$31,658,080	\$47,731,762
Gross Margin	34%	87%	96%	98%	98%
Net Profit	\$(2,478,379)	\$ (941,807)	\$ 6,088,740	\$19,797,788	\$20,094,030
Net Margin	-386%	-33%	46%	63%	42%
Cash	\$ 1,447,744	\$ 1,132,744	\$ 6,383,685	\$18,953,719	\$39,342,670



 Confident



Channel Your Energy



- Posture
- Movement
- Gestures/Animation
- Pause/Breathe
- Eye Contact

Culturally Agile





Understand Impact of Culture



*"The Japanese
need to show
more passion."*

Understand Impact of Culture



"The Americans need to understand that it's not just about money."



Understand Impact of Culture



*"It's South
America's time."*

Understand Impact of Culture



Task Completion

Equality

Direct

Individual

Short Term Focus



Relationships

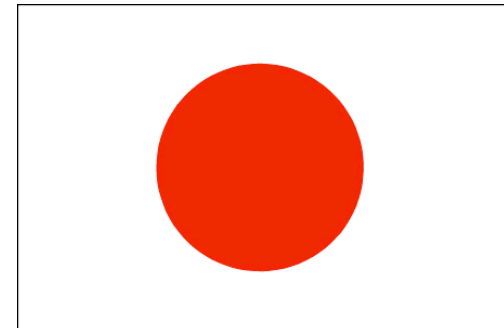
Social Status

Indirect

Consensus

Long Term Focus

Understand Impact of Culture



Task Completion



Relationships

Equality



Social Status

Direct



Indirect

Individual



Consensus

Short Term Focus



Long Term Focus

How to Be Culturally Agile?



- Tailor your content
- Adjust the amount and type of group interaction
- Modify your delivery



Steps to Add Value



Connect with your audiences



Create clear, concise and compelling content



Communicate with confidence



Collaborate across cultures



Thank You!

Questions?

